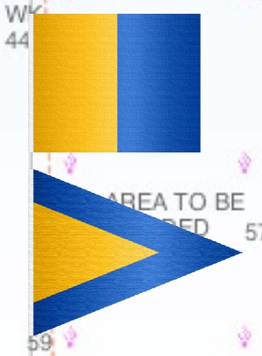
# User Manual Inventory

## for OS X, Windows and iPad



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May 2014, Version 1.0.0

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# Preface

With the Logbook add-on Inventory 2K Yachting expands the popular logbook software with a handy tool that can save you a lot of seeking in the ship. In Inventory you can store the precise location for each item in the ship, how of this item is in place and whether a soon replenishment is needed.

This documentation is held very detailed, so that no questions remain unanswered. Experienced computer/iPad users will be able to use Inventory without studying the whole documentation.

If you have any questions, please send an email to ***support@2k-yachting.de***.

We hope that you like Inventory and may there always be enough water beneath your keel...

Almute Kraus
2K Yachting, in May, 2014

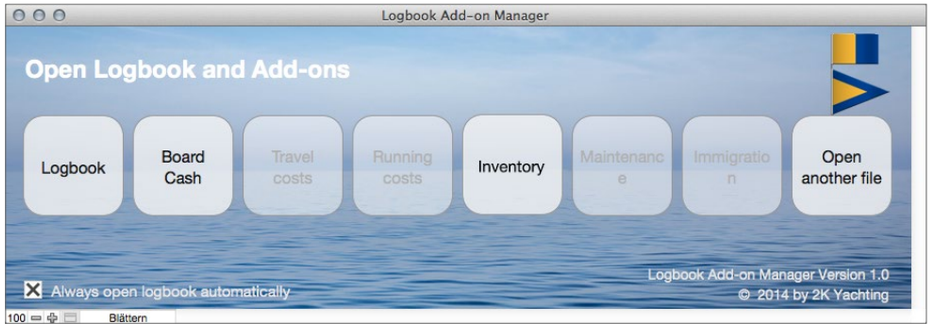
# Preparation: Install and Activate Inventory and Choose the Language

You can use Inventory on the PC with OS X (Mac) or Windows (Windows 7 or newer) and on the iPad, iPhone or iPod Touch. The use of Inventory is almost identical for all operating systems, for installation, however, a few specific points should be noted.

## Installing Inventory on PC

On the PC with OS X (Mac) or Windows (Windows 7 or newer) Inventory is a add-on to Logbook and therefore is started from Logbook.

If you have Logbook not yet installed, you first need to install Logbook with the installer on your computer first. Download the installation file for Logbook for your operating system (OS X or Windows) to your PC and then run the installation.




*The Add-on Manager when Inventory is installed*

If you have downloaded a new installation file for Logbook, in which Inventory is already included, you will see **Add-on Manager** after starting Logbook the and the button for the **Inventory Cash** appears white (as shown in the figure).

If you had already installed Logbook before and Inventory was not included in the program package at the time of installation, you can easily upgrade Logbook with our update installer, which can be downloaded from our download site: ***http://www.2k-yachting.de/software/download_en.html***.

- Run the installation program to update Logbook to the latest version with the **Add-on Manager** and the Inventory file **Inventory.LOB**.

### Note to the installation of Logbook for Windows

Please, note that on Windows computers you only can make entries in database software from accounts with administrator's right. Therefore it is necessary that you install Logbook with an account with all administrator privileges.

Nevertheless, with some Windows 7 installations the administrator account hasn't got all rights that are required for the use of a database software. In this case there is a rather simple solution:
Start Logbook using the context menu of the program and select **Run as administrator**.

Alternatively you can set up the link to the program Logbook thus the software automatically gets always the administrator privileges. Use the following options:
In the context menu choose the entry **Properties**, click the **Shortcut** tab, then on **Advanced** and activate the **Run as Administrator** check box. To finish click **OK**.

### Important note for installation of Logbook in OS X Mountain Lion and Mavericks

When Logbook is started with OS X Mountain Lion or Mavericks for the first time, in some cases you will get a warning that the developer was not certificated by Apple. This warning should prevent that software loaded from Internet installs itself. With the following steps you tell your Mac that you want to use the software:

1. Click on the software icon of Logbook 3.5 while holding the ctrl key pressed down.
2. In the menu choose **Open**.
3. Then click again on **Open**.
4. Now Logbook is saved as proper software and can be opened in future quite normally by double-click.

### Note on first launch of Logbook (OS X and Windows)

During the first launch Logbook needs to copy a few files from program package into the data folder. This copying process may in some cases take longer than the time until Logbook tries to open the logbook file Logbook.LOB. You will receive an error message.
Just quit Logbook and start the program again a little bit later. Now the copying process should be completed and Logbook.LOB can be opened.

## Installing Inventory on iPad or iPhone

Inventory is based on a FileMaker Pro database application. Therefore the database file **Inventory.fmp12** (or **Inventory.LOB**) can be opened and edited on iPad, iPhone or iPad Touch in the free App **FileMaker Go 13**.

*The App icon of FileMaker Go 13*

**Attention**

Before you can install Inventory on the iPad or iPhone, you need to have installed the free App **FileMaker Go 13** on your device.
Also the download of Inventory from our website directly with the iPad or iPhone can only be accomplished, if **FileMaker Go 13** is already installed. Only then the iOS respective Safari can allocate the downloaded file to an application.

### Downloading Inventory directly from Internet using iOS

If you want to use Inventory only on iPad or iPhone, we recommend to download the database file **Inventory.fmp12** directly from our website. You can use the button on our website at ***www.2k-yachting.de/logbook***.
While downloading you will be asked in which App you want to open the downloaded file. Choose **Open in "FileMaker Go"**. Then the App FileMaker Go starts and the new downloaded file is opened in FileMaker Go.
Now skip the next steps and go on with “How to Activate Inventory” on page 10.

### Transferring Inventory files using iTunes on PC

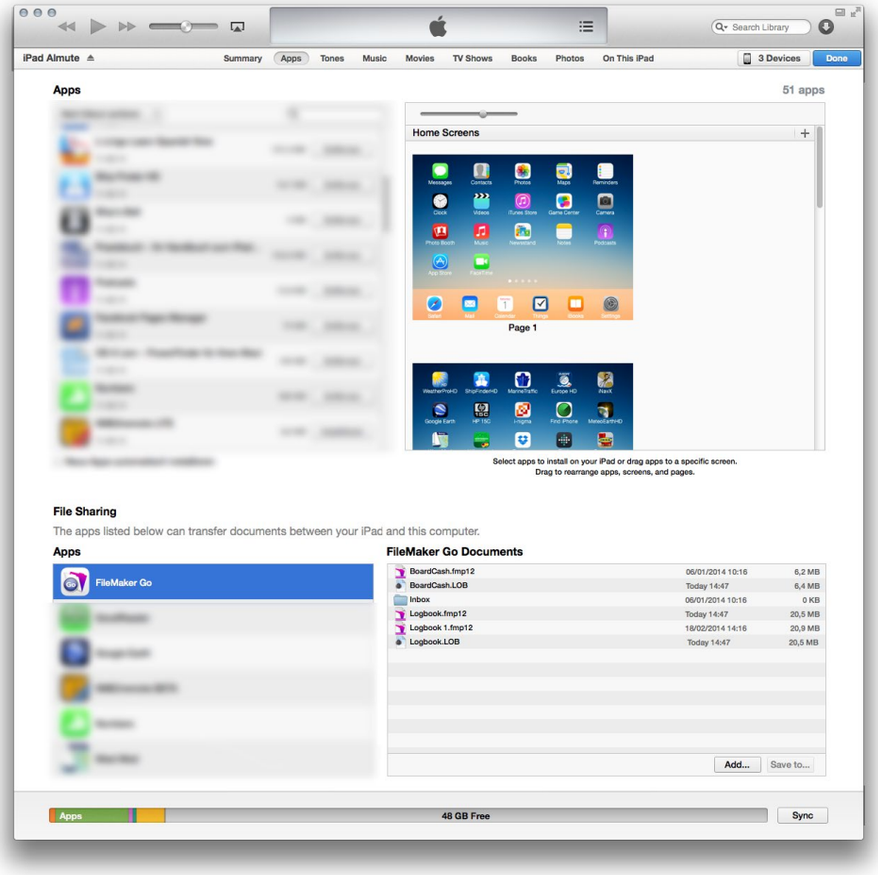
The following installation steps are best for all users who want to use Inventory on iPad as well as on PC (Mac OS X or Windows). First load and install Logbook 3.5 on your PC. After this you can transfer the Inventory data file **Inventory.LOB** of the PC version onto your iPad. There you can make your entries and transfer the file back to PC, later.
iTunes and iOS offer for all Apps, that can load or create files, the File Sharing option. When you attach your iPad, iTunes shows a list of your Apps which support file sharing. After you have selected your iPad in iTunes you will find this function on page **Apps** and there under **File Sharing**.

## Transferring Inventory.LOB from PC to iPad

1. Connect your iPad/iPhone to your PC (using USB or WiFi, depending on your setup for iPad in iTunes). In iTunes on the PC select your iPad and then **Apps**. In the list on the left choose the App **FileMaker Go**.
2. The button **Add...** opens a dialog box in which you can select the logbook file that you want to transfer to iPad. You will find the file **Inventory.LOB** in the data folder of Logbook (on the Mac in the folder "Documents/Logbook 3.5" inside of your user folder, with Windows in the folder "[system drive letter}:/Logbook 3.5").
3. Or drag the file with drag & drop from the Finder or the Explorer into the field.
4. This copies the file directly to your iPad and the file is listed in the file browser of FileMaker Go in the list **Device** under the headline **Other documents** and can be opened there.

## Transferring Inventory.LOB from iPad to PC

1. To transfer the logbook file back from iPad onto the PC, connect the iPad with the PC and select in iTunes on the PC your iPad and then in the list on the left on the page **Apps** the App **FileMaker Go**.
2. In the list at the right select the file **Inventory.LOB**.
3. With the button **Save as...** you now can choose a place where the file should be stored on the PC. Best of all choose again the standard data folder of Logbook (on the Mac in the folder "Documents/Logbook 3.5" inside of your user folder, with Windows in the folder "[system drive letter}:/Logbook 3.5").
4. Or drag the file with drag & drop from iTunes into a folder in the Finder or the Explorer.




*File exchange between PC and iPad using iTunes File Sharing*

**Transferring Inventory.LOB by email**

Since the database file from Inventory is only a little bit bigger than 6 MB, you can exchange the file by email between iPad and PC.

- When you receive on the iPad an email with the Inventory file as an attachment, tap in the email on the attachment and select from the popup **Open in "FileMaker Go"**. The file is now added to the file browser of FileMaker Go. It is important that the file has the extension fmp12 and that it had been closed on your PC before attaching it to the email, otherwise, the iPad can not assign the file o FileMaker Go.
- To send an Inventory file from the iPad as email attachment, open the file in FileMaker Go and tap the settings button ✲ of FileMaker Go in the top right of the title bar. Here, select die option **Save/Send**, and then **Database**.
  This will create a new email to which the Inventory file is attached.

## Set up the Language

If you want to use Inventory with German user interface, after the Inventory file is opened first click on the settings button (✲) of Inventory (Warning, on the iPad do not use the button ✲ of FileMaker Go in the header). In the popover **Settings** choose **Deutsch** from the list under **Language**. The language needs to be set up only once and stays active when the software is started the next time.

## How to Activate Inventory

When Inventory starts the first time the dialog box **Demo Mode** opens. Choose whether you want to start Inventory in demo mode, or you want to enter your serial number and activate your personal version of Inventory.
With the button **2K Yachting** you will be lead directly to the website of 2K Yachting where you can acquire a licence for Logbook.

With the demo version of Logbook you can manage up to 9 entries. You can only create more entries if Inventory is activated with a valid serial number. After the purchase of the licence for Inventory you will find the serial number in our shop in your personal download area.

**Tip: Use Inventory on the PC without Logbook licence**
To the use of Inventory you don't need a license for Logbook. If you are not using the logbook, you should turn off the option **Always open logbook automatically** in Add-on Manager.

### Activating Inventory

Use the following steps to activate your licence of Inventory:

1. When you start Inventory and the software has not yet been activated, the dialog box **Demo Mode** will be opened.
2. To activate Logbook click/tap on the button **Activate** at the bottom the dialog box **Demo Mode** and enter the serial number which you find in your personal download area of our shop and click/tap **OK**.
3. Alternatively, you can enter the serial number using the button **Enter** at the bottom of the popover **Settings** (button ⚙).

After entering a valid serial number the demo version is converted into a full version.

The serial number has the following layout:
*XXX-****-****-***
* signifies a digit and X a capital letter.

# Starting Inventory

Inventory and Logbook are based on a FileMaker Pro database application. Therefore there are a few special features which are important to know when starting the software Logbook and when opening and closing additional logbook files. All logbook files used on PC have the file name extension .LOB. On the iPad, all files directly loaded on the iPad have the extension .fmp12, but files with the extension .LOB can also be used on iPad.

## Starting and Quitting using OS X

First start the software Logbook 3.5 which is in the uppermost level in your program folder.
This opens two windows: the **Add-on Manager** and the standard logbook file **Logbook.LOB**.

*The program icon of Logbook / the icon of a logbook and of a Inventory file*

- To open your Inventory file go to **Logbook Add-on Manager** and click the button **Inventory**. If your Inventory is not named **Inventory.LOB**, you can choose to open the file with button **Open another file**.
- To close only your Inventory file, click on the closing button of the window with the Inventory file.
- To quite the entire program, open the communication popover (button ⇳) and click **Quit** or use—as usual on Mac— the keyboard shortcut ⌘Q.
- Also when you close the last opened window, the entire program is closed.

## Starting and Quitting using Windows

First start the software Logbook 3.5 which is inside of the folder “Logbook 3.5” in your program folder.
This opens two windows: the **Add-on Manager** and the standard logbook file **Logbook.LOB**..

*The program icon of Logbook / the icon of a logbook and of a Inventory file*

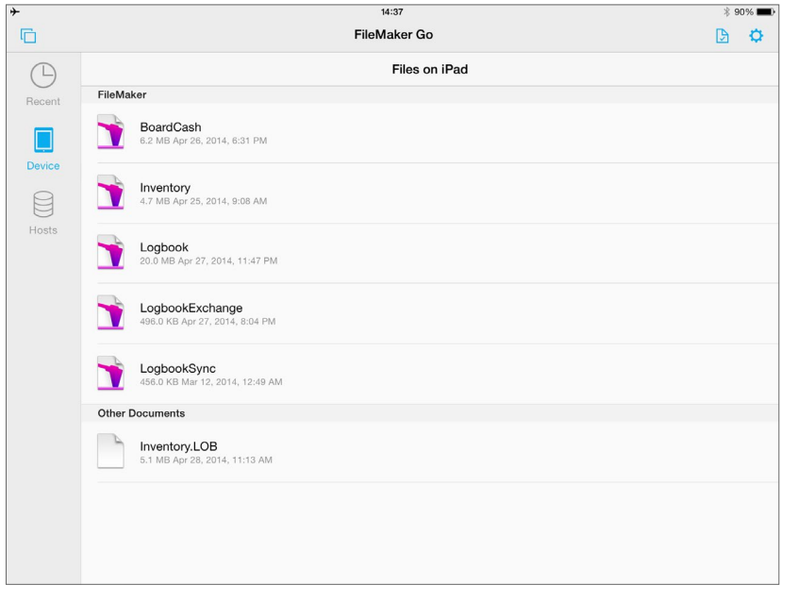
- To open your Inventory file go to **Logbook Add-on Manager** and click the button **Inventory**. If your Inventory is not named **Inventory.LOB**, you can choose to open the file with button **Open another file**.
- To close only your Inventory file, click on the closing button of the window with the Inventory file.
- To quite the entire program, open the communication popover (button ⇳) and click **Quit** or use—as usual on Mac— the keyboard shortcut ⌘Q.
- Also when you close the last opened window, the entire program is closed.

## Starting and Quitting using iOS

Unlike on PC on the iPad/iPhone Inventory is not opened in a special Logbook App. Inventory is a database file that can be opened and edited with the free iOS App **FileMaker Go 13**.

### Open a Inventory file in FileMaker Go 13

1. Start the App **FileMaker Go 13**. The file browser of the App is shown (see image further below).
2. Tap in the left area on **Device**.
3. If you want to use the file **Inventory.fmp12**, you will find your file listed with the name **Inventory** under **FileMaker**. The file **Inventory.LOB**, which you have transferred using iTunes, is listed under **Other Documents**.
4. Start Inventory by tapping on your logbook file in the file browser of **FileMaker Go**.
5. The file is opened and ready for your inputs.



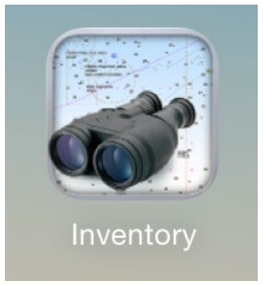

*The file browser of FileMaker Go 13*

### Closing the Inventory in FileMaker Go 13

1. To close the file **Inventory.fmp12** or **Inventory.LOB** and quit Inventory tap on the document icon, which is shown in the title bar of FileMaker Go in the top left of the window.
2. In the popover choose the entry **Windows**.
3. Then tap on the closing icon which is show on the top left of the reduced document window.
4. A message is shown which gives you the possibility to make a backup copy of your last file version.

## Launch icon for Inventory on iPad Home Screen

If you like you can install a launch icon for Logbook 3.5 on the Home Screen of your iPad. With this icon Logbook 3.5 can be started directly from Home Screen without using the file browser of FileMaker Go.




*The launch icon of Inventory*

To create this launch icon you need a special configuration file which you can download form our website (***http://www.2k-yachting.de/software/download_en.html***). Please note that the launch icon only can be used for files which are named **Inventory.fmp12** or **Inventory.LOB**.

**Tip: How to name you Inventory file correctly for launch icon**

In order to use the launch icon the Inventory file needs to have exactly the file name **Inventory.fmp12** or **Inventory.LOB**. However, if you loaded Inventory several times from our server, the file is automatically given an additional numbering in the file name during downloading so that the launch icon is not working. Unfortunately, the file name can not be edited in the file browser of FileMaker Go. This is where the following trick will help:

1. Open the file in FileMaker Go.
2. Open the communication popover ⇅ and choose the button **Backup**.
3. In the field **Name** of the following dialog enter exactly **Inventory** and tap **Save**. FileMaker Go adds the extension .fmp12 itself.
4. Now a file named **Inventory** is listed in the file browser of FileMaker Go. This file is your current Inventory file and can be opened using the launch icon.
5. You can delete unnecessary files from FileMaker Go file browser using iTunes on PC. Or, tap in file browser of FileMaker Go on the page icon, select the file and then tap the top left of the trash icon.

# Get to Know: The User Interface

The user interface of Inventory is almost identical on PC and on iPad. All the functions you need during data entry or for printing, etc., can be found in this popover that are opened directly via the buttons at the top right of the window.
If you already use Logbook, you will recognize many controls.

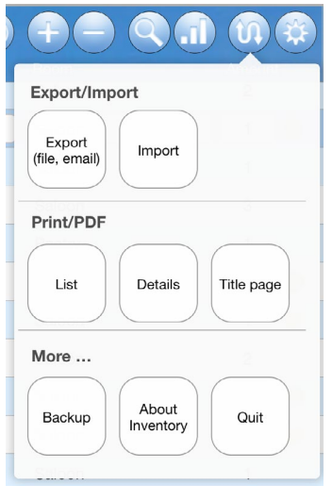
## The Buttons

In the area at the top right of the window of Inventory you find buttons that give access to all functions of Inventory.
The table gives a description of the buttons. The functions will be described in the corresponding chapters of this manual.
In addition there are invisible buttons in the view:

- In the **title view** tap/click on the image to open the **List view.**
- In **List view** or **details view** tap/click in the upper left corner to get back to the **title view**.

The buttons ⇅ , + and – open a popover with a kind of menu. Clicking on a text button opens either another popover with settings or executes the specified function.

To close a popover just click or tap on an empty space in the window of Inventory or use the closing button (⊗), which is located on many popovers in the upper right corner.




*The popover **Communication** (button ⇅) shows a menu with text buttons*

| Button | Function |
|---|---|
| | Show **Detail view** for selected entry* |
| | Show **List view**** |
| | Popover **New** (new entry,new entry in same location, duplicate entry) |
| | Popover **Delete** (this entry, all found entries) |
| | Popover **Find** (search by term or stock state) |
| | Popover **Sorting** (setting up the sorting of the list by category, item, stowage space etc.) |
| | Popover **Communication** (export, import, print, Backup, about Inventory, quit) |
| | Popover **Settings** |
| | Popover **Edit list** (edit the list for the field at the left)** |

*The buttons (* only in List view, ** only in Detail view)*

## The Views

For each item you want to manage in inventory, a separate entry is created. Inventory provides two different views for displaying your entries.

The **List view**, which is displayed automatically shortly after opening the file, displays a list-like overview of all entries. The list shows for each item in addition to name only a few additional details. If you have more entries than can be displayed in the window, you can scroll the list. Always, one of the entries in the list is selected. You can identify the selected entry on the slightly darker blue backing and the fact that the fields are white.

*The List view*

With the button ⓘ (either on the left in the row of the desired entry or on top of the window) you switch to the **Detail view** of the entry. Here all fields offered by Inventory are displayed.
If there are additional entries the list before or after the selected entry, a small triangle will appear on the left or right edge (〈 or 〉). Tapping or clicking on the left or right margin of the **Detail view** shows the previous or next entry.
The button ☰ switches back to the **List view**.

*The Detail view*

In both views you can see at the bottom of the screen the number of entries in the file, the number of entries displayed (important if you have made a selection) and the position of the activated entry within the list.

## Zoom Levels

On PC Inventory offers several zoom levels. According to the size of your screen the zoom level **100%** or **150%** will work best for you. In addition, the zoom can be increased to 200%, 300% and 400% as well as reduced to 75%, 50% and 25%. Usually these zoom levels will not be suitable for the standard use of Inventory.
The zoom level can be set with the fields in the bottom left corner of the window frame. If you resize the window, and the window is smaller than the minimum window size scrollbars are shown. Use the window zoom button to optimize the size of the windows.

| Button | Function |
|---|---|
| 150 | The numerical value shows the current zoom level<br>1st mouse click chooses the zoom level 100%<br>2nd mouse click switches back to the last zoom level |
| – | Reduce view one step (zoom out) |
| + | Enlarge view one step (zoom in) |

*Icons in windows frame*

## Zoom (only on iPhone and iPod Touch)

The layout of Inventory was designed for best view on the PC and on the iPad. But you can also use Inventory on the iPhone or iPad Touch. Here also have the option of using the two-finger gesture to zoom. This way you can enlarge the data you want so see.

## The Fields

In INVENTORY the information is entered and displayed in fields.

> **Attention**
> Note, however, your entry is only completed and permanently stored in the INVENTORY file after you moved the cursor out of the entry fields. To do this or click or tap on an empty area in the window.

### Standard Fields

Standard fields allow the input of text or numbers.

#### Entering text or numbers on PC

1. When you click with the mouse on a standard field a text cursor appears.
2. Enter your text or the numerical value.
3. Finalize the input of your data by moving the cursor further to the next field with the tabulator key, the return or the input key. Or click with the mouse at a place outside of the field.

#### Entering text or numbers on iPad

1. When you tap on a standard field a text cursor appears and the keyboard is shown.
2. Enter your text or the numerical value.
3. Finalize the input of your data by moving the cursor further to the next field with **Next** (on the keyboard or in the bar on top of the keyboard). Or tap at a place outside of the field, which will hide the keyboard too.

### Fields with Drop-down Value Lists

In INVENTORY many fields show a drop-down list with possible entries when you activate the field.

- All fields, for which a predefined list is provided, show a drop-down list with the entries that you have set for this field in popover **Edit list** (in **Detail view** with the button ✎ to the right of the field, see "The list popover" on page 21). But in this fields you can also make your own entry instead of selecting from the list.
- Other fields provide a drop-down list that is are generated automatically by INVENTORY and shows all entries that you have previously entered in the appropriate field. Thus you don't need to type frequently used data over and over. At the beginning of the work with a new INVENTORY file these lists are empty.

1. Scroll through the list and click/tap on the appropriate entry.
2. The entry is inserted and the cursor automatically moves to the next field.

In order to do enter your own text on PC you need to click in the field once again while the drop-down list is shown. The list is closed and you can now type in your own data.

On iPad you can hide the list with the button ☰ (in the bar on top left of the keyboard) and then enter your text using the keyboard.

## Fields for Images

In the **Detail view** you can insert an image of the item into the large field on the top right.

**Inserting an image on PC**
There are different ways to insert an image. Follow these steps:

1. Click on the button in the image area.
2. This opens the dialog box **Insert Picture**, where you can choose the desired image.
3. If you select the option **Store only a reference to the file** only a link to the image file will be inserted into the logbook file instead of the image itself. This will keep the logbook file smaller. Nevertheless, if the image file will be moved to another place or renamed, the image will no longer appear in the logbook file. If the image file is edited it will be updated automatically in the logbook file, too.
4. Once you click **Insert**, the image appears in the image area. The image will be reduced proportionally to fit into the image area, that no image sections are cut off.

You can also select an image in your image editing program (e.g., Apple iPhoto or Adobe Photoshop), copy it and insert the image into the field from the clipboard.

1. Click in the picture area. It now shows a black border (not on the button).
2. Insert the image from clipboard.

Or drag the image directly from Finder, Explorer or out of iPhoto into the image area.

The following image file formats are supported by Logbook: JPEG (.jpg), PDF (.pdf), PNG (.png), TIFF (.tif), Photoshop (.psd), PICT (.pct) and, in addition the less common formats JPEG 2000 (.jp2), MacPaint (.mac), PICS (.pcs) as well as Windows Bitmap (.bmp).

**Note:**
When inserting the image into Logbook the size of the image is automatically reduced to a size which is a good compromise between file size and image quality. So it is not necessary to use the setting **Store only a reference to the file.**

**Deleting an image on PC**
If you want to remove an image, click on the image and then press the Backspace or the Delete button.

**Inserting an image on iPad**

1. Tap in the picture area. An import popup is shown.
2. Choose whether you want to take a picture with the iPad's camera and insert this or you choose a picture from your photo gallery.
3. As soon as you have selected a picture, it appears in the image field. The image will be reduced proportionally to fit into the image area, that no image sections are cut off.

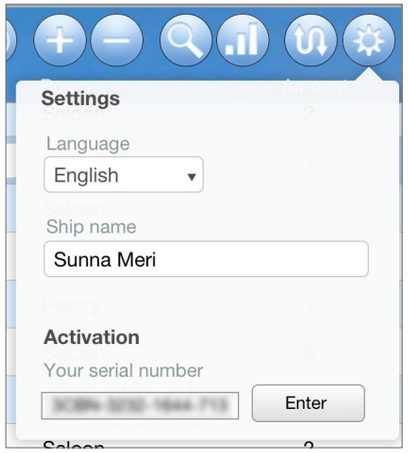
If the image field already contains an image, you can choose in the popup whether you want to delete the image or substitute it with another.

# Customize the Inventory file: Settings and Lists

Before you use Inventory the first time your should make a few settings and customize the default lists for your boat.

## The Popover Settings

First use the button ✲ in the right of the window to open the popover **Settings**. In this popover you can set some defaults.




*The popover **Settings***

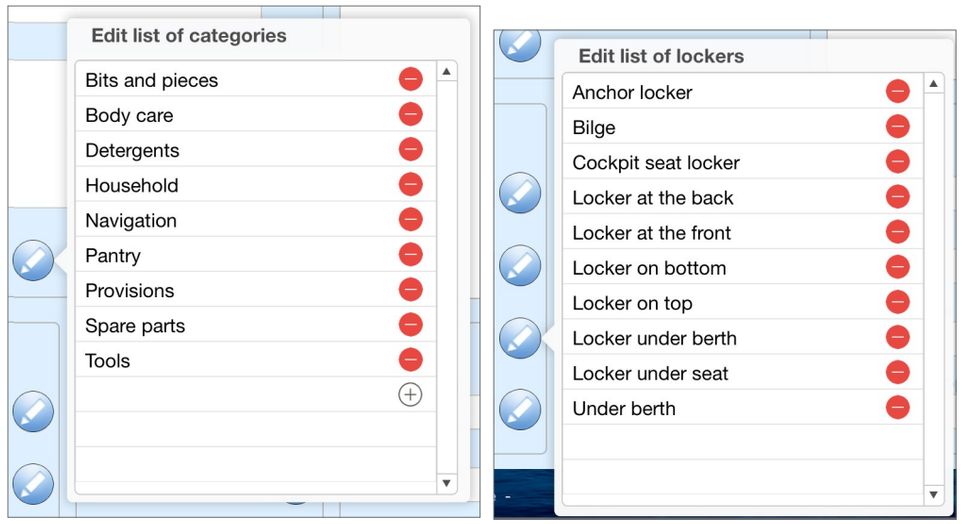
**Language**
Choose the language for the user interface of Inventory. At this moment we support German and English.

**Ship name**
Enter the name of your ship. The name is displayed on the title page and on the top left of the **List view** and **Detail view**.

**Activation – Your serial number**
This field shows your actual serial number. If you didn't enter a serial number yet, choose the button **Enter**. The field itself is not editable.

## The List Popover

In the **Detail view** (to enable this view from **List view** select the button ⓘ) you see next to some fields a button ✎. This button opens a popover, in which the entries in the drop-down list for the field left to the button can be edited.
The entries already shown in the lists are only intended as suggestions. You can edit or delete all existing entries that you don't need. Open the lists, and adjust the lists for your ship. Of course you can add entries to the list later at any time during the work with Inventory.




*Popover for editing the list for field **Category** and Popover for editing the list for field **Locker***

- To add a new entry click/tab on the plus sign at the bottom of the list and type the text in the field.
- To delete an entry click/tab on the minus sign at the end of the line. After a warning message the entry will be deleted from the list.

**Attention**
Deleting an entry from the list has no effect on existing entries. The entries remain untouched, even if you remove the entry from the list.

# Inventory in Practice

After you have prepared your Inventory file as described on the previous pages, you can start with the entries in the inventory list. The following table provides an overview of all available fields. All fields marked with a * are also displayed in the **List view**.

## Table of Fields

| Field | Description | How to enter |
|---|---|---|
| **Item*** | Unique name for the item | • Manual input |
| **Description** | Space for a detailed description of the item | • Manual input |
| **Category*** | The category arranges the items on the type or purpose | • Choose from list of categories<br>• Manual input |
| **Insert Photo here** | Here you can insert a photo. The image size is reduced to 640 pixel. | • Selection of image using button, by tapping on the image area or by dragging the image into the field (depending on operating system) |
| **Area Storage location** | | |
| **Room*** | Storage location level 1: a room of the ship | • Choose from list of rooms<br>• Manual input |
| **Side** | Storage location level 2: side in room | • Choose from list of sides<br>• Manual input |
| **Locker** | Storage location level 3: locker, cabinet etc. | • Choose from list of lockers<br>• Manual input |
| **Shelf/Box** | Storage location level 4: shelf, storage container | • Choose from list of shelfs and boxes<br>• Manual input |

| Field | Description | How to enter |
|---|---|---|
| **Area Stock** | | |
| **Amount*** | Available quantity or number of the item—<br>if also a minimum amount is entered, a colored circle at the right of the field indicates the state of the stock | • Manual input and automatic calculation of the state |
| **Unit of quantity** | Unit used when specifying the amount | • Choose from list of quantity units<br>• Manual input |
| **Minimum quantity** | Minimum required amount/numbers of the item | • Manual input |
| **Time stamp of last edit** | Date and time of last of the entry | • Automatic calculation |
| **Area Purchase** | | |
| **Manufacturer** | Information on manufacturer of the item | • Choose from list of already entered manufactures<br>• Manual input |
| **Item number** | Item number | • Manual input |
| **Serial number** | Serial number | • Manual input |
| **Source of supply** | Supplier for replacement of the item | • Choose from list of already entered sources<br>• Manual input |

**Please note**
The time stamps will only be refreshed if contents of fields are changed. If you, for instance, only click or tap in a field make no changes to the field's contents, the time stamp doesn't change.

## The Storage Location

In Inventory you can specify for each managed item exactly where it is stored inside the ship. Inventory provides a clear system, wherein the indication of the storage area is hierarchically structured in four levels.

- The top level of the storage area is the **room** inside the ship. This can be, for example, the saloon or the cockpit.
- In the next level you define the side inside of the room, where the item is stored (for example on the starboard side) .
- On this side of the room there may be multiple lockers or cabinets. This is specified with the third hierarchical level (eg. locker under seat).
- And to get a most precise storage location you then can specify in the fourth level a shelf or a storage container (**Shelf/Box**) inside the locker.

The lists for the storage location fields are already filled with some suggestions. These should be adjusted according to the available storage locations in the ship ( see “The List Popover” on page 20).

Inventory is not only suitable as inventory management tool for the ship, but just as well for the hobby room, the workshop, the maintenance of stocks and much more. Here the hierarchical classification system is useful, too, however, the lists need to be adjusted.

## Entry for a New Item

Entering the information for the items in the Inventory file is quite simple.

### Create a New, Empty Entry and Enter Data

For each item there is a separate entry (record). If you want to enter data for a new item, you first need to create a new entry. You can do this both in **List view** and in **Detail view**.

1. Choose on top of the window of Inventory the button +.
2. This opens the popover **New** that provides three text buttons for creating a new entry to choose from. To create a new, empty entry, select **New item**.
3. Now in **List view**, a new row is created and the cursor is placed in this row into the first field (**Category**).
   In the **Detail view** a new, blank page is created and the cursor is placed into the first field (**Item**) .
4. Now enter into the fields all the information about your item. You can set the cursor from one field to the next using the tab key or by tapping **Next**.
   It is recommended that you choose a **category** for each item. This makes it easier to sort and search.
   Under **Storage location** you specify in a four-level hierarchy , where the item is stored.
   If you want to receive stock alerts, you need to specify in the field **Minimum quantity**, what amount should be at least in stock.
   For details about the fields, see the “Table of Fields” on page 21.

5. The field **Time stamp of last edit** will be filled in automatically.
6. Though, remember that the entries are not saved in the inventory file before you have moved the cursor out of the fields of this record.

**Attention: The special case empty Inventory file**
If you start to work with a new, empty Inventory file, the first entry is already created. So you don't need to create a new entry and can start your inventory by entering data in this entry.

### New Item on the same Storage Location

If you want to enter several items that are stored in the same place, you can use **New item in same location** from the popover **New**.

1. Activate an entry already created for an item at the desired storage location.
2. Choose on top of the window of Inventory the button +.
3. Then in popover **New** select the text button **New item in same location**. The function creates a new entry in which the fields for the storage location are already filled with the data from previously selected item.

### New Entry by Duplicating

If you want to create an entry for an item, which is much similar to another item for which you have already created an entry, you can use the option **Duplicate item** from the popover **New**.

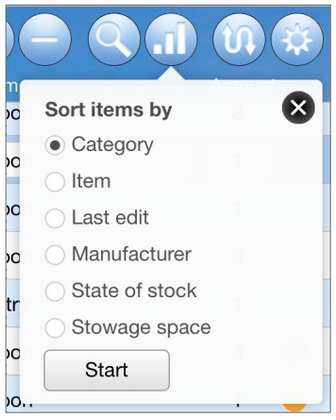
1. Select the entry that you want to duplicate.
2. Choose on top of the window of Inventory the button +.
3. Then in popover **New** select the text button **Duplicate item**. The function creates duplicate of the previously selected item.
4. Now edit the fields according to the new item.

### Deleting an Entry

1. If you want to delete an entry completely, click or tap the minus button in top of the window.
2. Now you can choose in popover **Delete** if you only want to delete the selected entry (**This entry**) or all entries that are currently displayed in the **List view** (**All shown items**).
3. After a confirmation message, the entry is deleted.

## Sorting your Entries

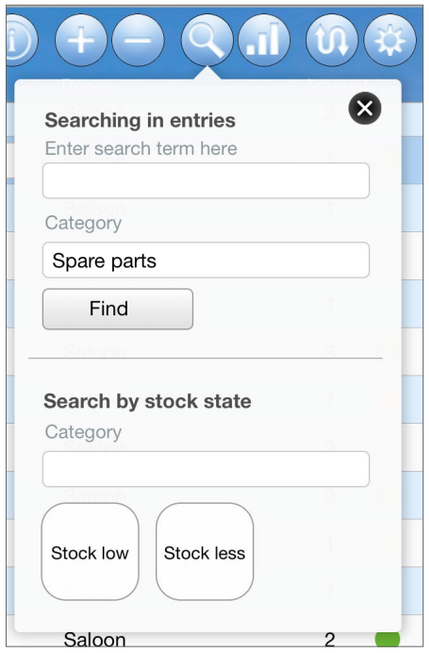
Using the options in the popover **Sorting** (📶) you can sort your entries.
In **List view** the entries also can be sorted easily by clicking or tapping on the column title **category**, **item** or **room**.
When sorting by **room**, the items within a room are sorted even according the additional storage location fields for the next levels. This means for example, that all objects, that are in the saloon on the port side in the locker under the seat in the red box, are listed in alphabetical order.




*The popover **Sorting***

## The Search Function of Inventory

Using the options in popover **Search** (button 🔍) you can search in your inventory list under different viewpoints for items and so restrict the items displayed in the list.




*The popover **Search***

1. Click or tap on the **Search** button 🔍 to open the popover **Search**.
2. The popover **Search** offers two different and independent search types. Enter your search criteria as described in the following two sections, and then click or tap the button **Find.**
3. Inventory will now search for all entries that match your search criteria and only display the entries that were found. If you searched for a specific term, this term will not be highlighted on the pages. But all items displayed contain this term. To indicate that not all entries are shown the symbol 🔍 in **Search** button gets red.

4. Tap the **Search** button again to bring all items in sight again. The symbol in **Search** button gets white.

### Searching in Your Entries

Using the fields at the top of the popover **Search** you can search for a term or a string.

- If you type a search term in the field **Enter search term here** and then click or tap on the button **Find**, all entries will be listed in which this string occurs. The string can be in any field of this entries.
- If you choose, in addition to a search term, a category from the list in the field **Category**, only items will be listed, in which the search term occurs and which also belong to the specified category.
- If you do not specify a search term, but only a **category**, all entries will be listed that belong to this category.

### Searching by Stock State

Using the fields at the lower part of the popover **Search** you can search for entries whose stock is low or too low.

- If you click or tap on one of the buttons **Stock low** or **Stock less** all items are listed, for which the stock state is low (orange and red dot) or too low (red dot).
- When you first choose a category from the list in the field **Category** (the one shown beneath the headline **Search by stock state**) and then select one of the two buttons **Stock low** or **Stock less**, only items with low or too low stock are show that also belong to the specified category.

**Tip: Creating a shopping list for spare parts**
With Inventory you can easily create a shopping list for example for spare parts that should always be in sufficient quantity on board:

1. Be sure when creating the entries for your the spare parts to always set up the appropriate category.
2. For your shopping list create a list of all spare parts with low stock. To do this open the popover **Search** (button ), select from list in the field **Category** beneath the headline **Search by stock state** the category used for this kind of spare parts and then choose the button **Stock low**.
3. Now you can print this list, or create a PDF file and send this by email (see “Printing the Inventory or saving in PDF” on page 29).

## Importing Items

Due to the different operating systems Inventory provides on PC and iPad a slightly different import function.

### Importing Entries on PC

If you have already started a list of your ship's inventory ship with a standard application such as Excel, you can import that data into Inventory. Or import items from another inventory file.

1. In **communication** popover (button ⇅) select the button **Import**.
2. This opens a dialog where you can choose if you want to import from an Inventory file or from a file created with another program.
3. If you select **Inventory** a dialog is opened where you need to select the Inventory file, from which you want to import. After you have selected the file, the import runs automatically. When it is finished a message shows how many new entries have been imported. Entries for items that are in both files are updated with the data from the imported file.
4. If you choose **Other**, Inventory opens a dialog for selecting the file from which you want to import data. For a list of supported file formats refer to table "Supported file formats for data import on PC" on page 27.
5. In the next step, you need to match the columns in your import file to the fields of Inventory. To do this, use the **Import Field Mapping** dialog which is now opened and move the target fields to the appropriate source field. It is important that for each field that you want to import, an arrow points from source field to target field.
   In the dialog the fields are listed with the program internal names. An assignment of these names to the field titles of Inventory is provided in the table "Program internal field names" on page 28.
   Activate the option **Update existing records in found set** if you want to avoid identical records .
6. After you have matched all fields, click on **Import**. This opens the dialog **Import Options**. Enable the option **Perform auto-enter options while importing** and click on **Import**. This starts the import process. When it is finished a message shows how many new entries have been imported.

| File formats for data import in Inventory |
|---|
| Tab-separated text file |
| Comma-separated text file |
| Merge file |
| Excel 95-2004 workbooks (.xls) |
| Excel workbooks (.xlsx) |
| dBase file |
| XML data source |
| ODBC data source |
| Bento data source |

*Supported file formats for data import on PC*

| Internal field name | Field title in Inventory |
|---|---|
| item | Item |
| description | Description |
| category | Category |
| storage location 1 | Room |
| storage location 2 | Side |
| storage location 3 | Locker |
| storage location 4 | Shelf/Box |
| amount | Amount |
| unit | Unit of quantity |
| minimum quantity | Minimum quantity |
| time stamp | Time stamp |
| manufacturer | Manufacturer |
| item number | Item number |
| serial number | Serial number |
| source of supply | Source of supply |

*Program internal field names*

## Importing Entries on iPad

On the iPad you can only import entries from another Inventory file which is stored in the file browser of FileMaker Go 13.

1. In communication popover (button ⇅) select the button **Import**.
2. It opens an information dialog. Select **OK** to continue.
3. In the following dialog enter the name of the file from which you want to import the entries into your actual inventory file. The file name is case-sensitive. The file extension only needs to be typed if you want to import from a .LOB file. Start the import process by clicking **OK**.
4. The import will run automatically. When it is finished a message shows how many new entries have been imported. Entries for items that are in both files are updated with the data from the imported file.

# Printing the Inventory or saving in PDF

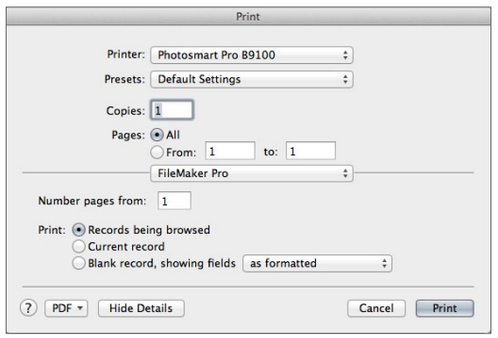
If you would like to print your Inventory or save it in a PDF, you can use the printing function of Inventory.
With a PDF, you will receive a digital version of your Inventory file, which can not be modified. You can view the Inventory PDF at any time later without the need that our software Logbook is installed on the computer or FileMaker Go on iPad. And since the PDF files are small, they are also very suitable for emailing.
The popover **communication** (button ⇅) offers under the headline **Print** text buttons for printing three different the print-optimized layouts. All print layouts are designed for printing in portrait format on A4 or U.S. Letter.
The following table shows what content will be printed with the individual print layouts.

| Print layout | Contents | Number of pages |
|---|---|---|
| **List** | List with all entries shown in **List view** | min. 1 |
| **Details** | Detail view of all shown entries, one page per entry | min. 1 |
| **Title page** | A decorative title page for the cash box with ship name and dates | 1 |

## Page Setup and Printing using OS X

The default printer page is setup in a way that the views can be printed in portrait format on a DIN A4 or US letter sheet. If the setting is not proper for your printer, you can setup the page in the dialog box **Page Setup** from the **File** menu. This opens the standard dialog box **Page Setup** of OS X.

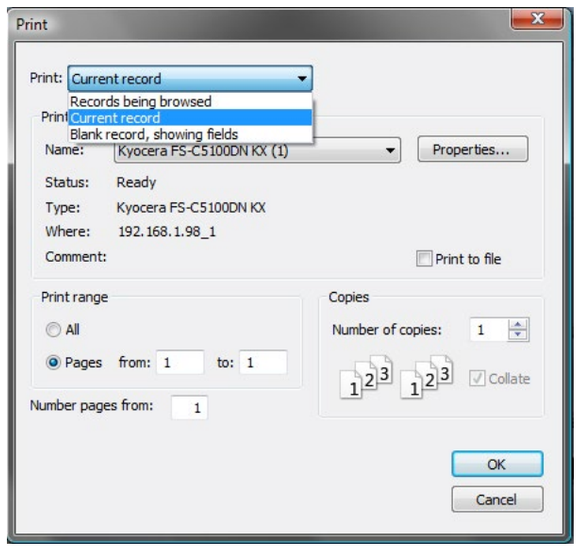
1. In communication popover (button ⇅) choose the button for the desired print layout.
2. This opens the standard dialog box **Print** of OS X. Activate the dialog's page with the settings for **FileMaker Pro.** For the option **Print** select **Records being browsed** (which means all records). Also make sure that for the option **Pages** the setting **All** is selected. Just so all pages of the selected layout will be printed.
3. After you have checked all settings, start the print job with the button **Print**.




*The **Print** dialog box under OS X*

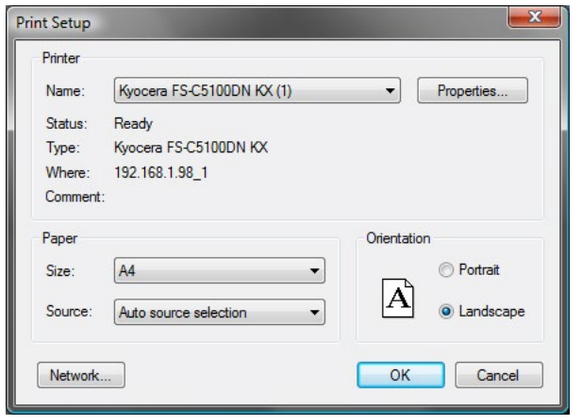
## Print Setup and Printing using Windows

1. In communication popover (button ⇅) choose the button for the desired print layout.
1. This opens the standard dialog box **Print** of OS X. For the option **Print** select **Records being browsed** (which means all records). Also make sure that for the option **Pages** the setting **All** is selected. Just so all entries of the selected layout will be printed.




*The **Print** dialog box under Windows*

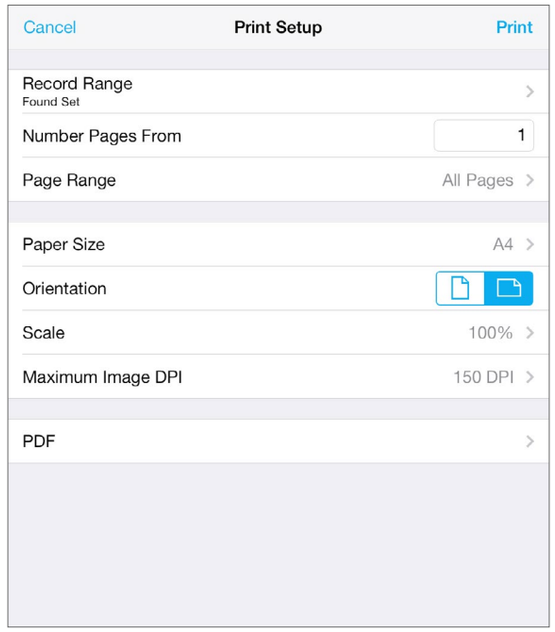
2. Then, next to the name of your printer , click on the **Properties** button. This opens the dialog **Print Setup**.
3. Select here under **Paper - Size** the size paper **A4** or **US letter** and under Orientation the option **Portrait**. Then close the **Print Setup** dialog with **OK**. (How exactly your dialog **Print Setup** looks like depends on your printer. Please read, if necessary, in the operating instructions of your printer.)
4. Again check all other settings in the print dialog. If you want to print all pages, the setting **All** needs to be selected for **Pages**.
5. After you have checked all settings, start the print job with the button **OK**.




*The dialog box **Printer Setup***

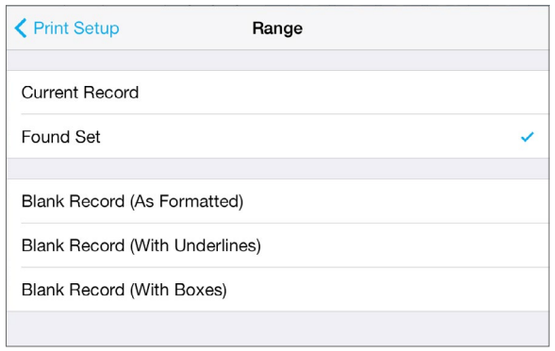
## Print Setup and Printing on iPad/iPhone

On iPad/iPhone you need a printer which is capable for AirPrint (for details of setting up the printer refer to the manual of your printer or the iPad manual).




*The dialog box **Print Setup***

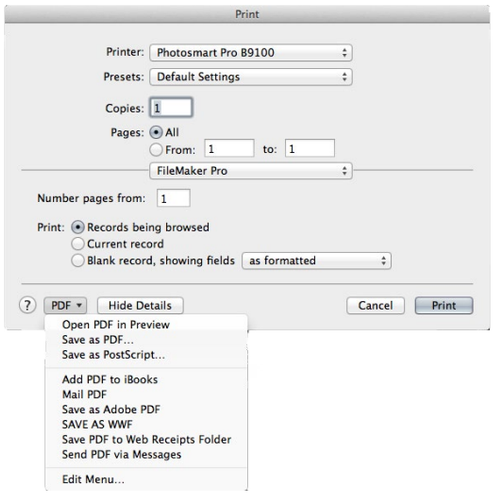
1. In communication popover (button ⇅) choose the button for the desired print layout.
2. This opens the standard dialog box **Print Setup** of FileMaker Go. For the option **Record Range** select **Found set** (which means all records). Also make sure that for the option **Page range** the setting **All Pages** is selected. Just so all pages of the selected layout will be printed.
3. Choose the paper size (A4 or US Letter) and make sure that you have set up **Portrait** for **Orientation** and **100%** for **Scale**.
4. After you have checked all settings, start the print job with the button **Print**.




*Standard setting in dialog **Print Setup, Range** of FileMaker Go*

## Creating a PDF on Mac

When you are using Logbook on a Mac you can also store your Inventory file in a PDF file instead of printing on paper. For this you have to follow the same steps described for printing (see in the chapter “Page Setup and Printing using OS X” on page 29).
But after you set up the appropriate settings in the print dialog box, don’t click on the button **Print**, instead you have to choose the option **Save as PDF...** from the list, which is opened with the button **PDF**.




*Saving a print layout in a PDF file*

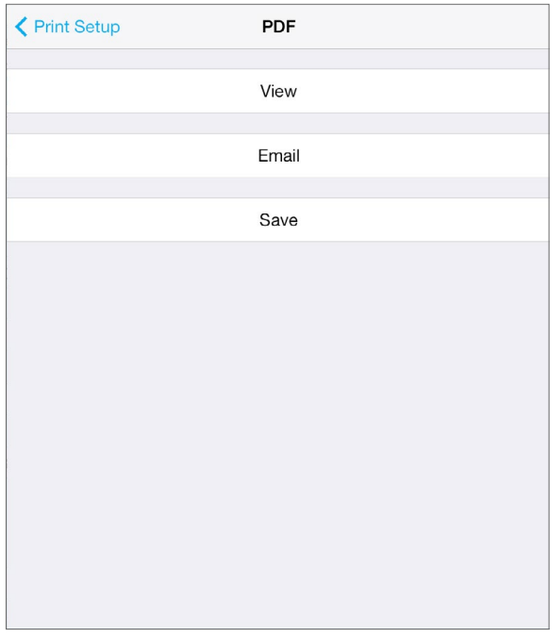
## Creating a PDF using Windows

If you are using Windows and would like to store your Inventory file in a PDF file instead of printing on paper, it is necessary to have installed a PDF printer. You can download PDF printers freeware software in the Internet.
Printing with a PDF printer is similar to printing with a normal printer, the only difference is that you print in a file instead of on paper. So follow the same steps described for printing (see in the chapters “Print Setup and Printing using Windows” on page 30).

## Creating a PDF on iPad

On iPad it is very easy to export your Inventory file into a PDF. To do so first follow the same steps described for printing (see in the chapter “Print Setup and Printing on iPad/iPhone” on page 31 ).

1. After you have completed your settings in dialog box **Print Setup** of FileMaker Go tap on **PDF** at the bottom of the dialog box.
2. In the following dialog box you get the three options **View**, **Email** and **Save**.
   - With **View** the PDF will be displayed first and then can be sent by email, printed or opened in another App using the export menu on the top right.
   - **Email** creates a new email where the PDF is already attached.
   - **Save** saves the PDF file in the browser of FileMaker Go on your iPad. You can find the PDF in list **Device** under the headline **PDF**. If you tap on the entry the PDF is displayed the same way as with the option **View.**




*The dialog box **PDF***

# Additional Functions of Inventory

This chapter presents a few additional functions of Logbook and Inventory.

## Protect your Data

To prevent a data loss you should regularly make a backup copy of your Inventory file.

Every time you close your Inventory file, you are prompted for data backup. To start the backup choose the button **Backup** in the dialog box**.**

Alternatively, you can start the backup by choosing in menu of communication popover (button ⇅) the button **Backup**.

**Please note:**
We recommend to copy the backup file of your Inventory file on another device, send it with email, or save it in your Dropbox. This will ensure that your Inventory data will be preserved—even in case of failure on the iPad/iPhone.
You can easily copy the file to your PC using iTunes. Read more about this in the section “Transferring Inventory files using iTunes on PC” on page 7.

### iOS Backup on iPad

1. Choosing the backup function will open the dialog box **Database**, where you can enter a name for the backup copy.
2. Tap **Save.** FileMaker Go now creates a duplicate of your file. This may take some time. If your Internet connection is really good, you can send the file by email. However, it is at least 5 MB.

### iOS Data Backup in your Dropbox

In FileMaker Go (minimum version 13.0.4) you can copy files from file browser into your Dropbox. This is useful if you want to save a backup copy of your files on the network. To use this function you need to have installed the free App **Dropbox** on your iPad and in addition, you need to have a Dropbox account.

**Saving FileMaker files in your Dropbox**

1. In FileMaker Go activate the file browser by tapping on the document icon ⧉ in the top left of the title bar.
2. In the popover select the entry **Home** .
3. Then tap on **Device** in the column left. Now all FileMaker files stored in FileMaker Go 13 on your iPad are listed.
4. Tap in the top right on the page icon ⍰ and then select the file or files that you want to upload into your Dropbox.
5. Now tap in the top left on the symbol ⍐ and select the option **Open in Dropbox** from popover.
6. The App **Dropbox** is activated and you can select in the column on the left the location within your Dropbox, where you want to save the selected file(s). Tap **Save** to upload the file(s ) into your Dropbox.
7. Then switch back to FileMaker Go and tap in the top right on **Done**.

### Loading a FileMaker file from your Dropbox

Of course, you also can load files that are stored in your Dropbox into the file browser of FileMaker Go 13 on your iPad.

1. Open the App **Dropbox** and locate the desired file in your Dropbox.
2. Tap on the file and wait until it is fully downloaded onto your iPad. Now, in the right column a question mark is shown, indicating that the file can't be viewed.
3. Tap in the top right of screen on the symbol ⎙ and select in the popover the option **Open in...**. This opens another popover in which the option **Open in FileMaker Go** is available.
4. Tap this option. The file is now inserted into the file browser of FileMaker Go and it is directly opened in FileMaker Go.

### Backup on PC

On PC you can simply duplicate the file with the Finder or Explorer. Nevertheless, to do this the file has to be closed, otherwise you will receive an error message when you open the backup copy later.
But you can also use the backup function when closing the file or by choosing in menu of communication popover (button ⇅) the button **Backup**.

1. Choosing the backup function will open the dialog box **Save as**, where you can enter a name for the backup copy. In the dialog box you can also choose the option **Type: compacted copy (smaller)** to save space on your disk.
2. Click **Save**. Logbook now creates a duplicate of your file. This may take some time.

If your Internet connection is really good, you can send the file by email. However, it is at least 5 MB.

## Data Export

With the button under **Export (file, email)** in the menu in communication popover (button ⇅) Inventory provides a simple export feature, which allows you to export your Inventory data for further processing in some common file formats. The file formats, which are shown in gray in the table are less suitable for export from Inventory.

| File format | PC | iPad | Field titles |
|---|---|---|---|
| dBase (.dbf) | x | x | x |
| Excel Workbook (.xlsx) | x | x | x |
| HTML (.htm) | x | x | – |
| Comma-separated (.csv) | x | x | – |
| Merge (.mer) | x | x | x |
| Tab-separated (.tab) | x | x | – |
| XML | x | | |
| FileMaker Pro | x | | |

1. To export your Inventory file open the communication popover (button ⇅) and choose the button **Export (file, email)**.
2. This opens a dialog box in which you specify the file format, name and location for your file. Other settings are not possible.

iOS

3. On iPad the button **Save** saves the exported file in the file browser of FileMaker Go on your iPad. You can find the file in the list **Device** under the heading with the name of the selected file format or under **Other Documents**. Alternatively, you can send the file directly by email.

**Note:**
In some export formats the file contains only the data and no titles of the fields. And when exporting in one of the data formats which include field titles, these come from the internal processing of Inventory and are not identical to the field titles in the views. So, for the order of the fields please refer to the following table. The order of the fields corresponds to order when entering data in the **Detail view**. Images can not be exported.

| Exported fields |
|---|
| Item |
| Description |
| Category |
| Room |
| Side |
| Locker |
| Shelf/Box |
| Amount |
| Unit of quantity |
| Minimum quantity |
| Time stamp |
| Manufacturer |
| Item number |
| Serial number |
| Source of supply |

# Troubleshooting

## Restore a Damaged File

If you have a crash of the computer's operating system (on PC) or a hard disk access error while you are working with Logbook, it may happen—in quite rare cases—that the logbook file gets damaged. In this case you will receive an error message when you try to open the logbook file next time. Normally this can be repaired quite simple.

1. For OS X press the keys ⌘ and ⌥, for Windows press the keys Ctrl and ⇧ and double-click on the icon of the program Logbook. Hold the keys pressed until the dialog box **Open damaged file** is displayed.
2. Select the damaged file and let Logbook do the recovering. Logbook creates a new file with the original file name and adds at the end of the name of the damaged file "OLD". A dialog box informs you about the steps Logbook is performing.
3. Open the restored logbook file and choose in menu of the communication popover (button ⇅) the button **Backup**. Save a copy of the restored file with the same name and use the option **Type: compacted copy (smaller)**.
4. Replace the restored file with the copy you just created.

If you should notice an unusual behavior with this new file, we recommend to go back to a backup copy which you already created before the damage.

## Updates

2K Yachting will develop Logbook and Inventory further and add new functions. From time to time 2K Yachting will provide a software update. Find out more on our website at ***www.2k-yachting.de/software/software.html***. If you register your software, we will send you an email as soon as an update is available.

## Error Report

Although Logbook has been proved in practice, there may occur an error while using the software.
In this case we would be grateful if you inform us about the error, thus we can patch it with the next software release.
Please send an email with a precise description of the error to ***support@2k-yachting.de***.

## System Requirements

To run Logbook 3.5 and Inventory your computer needs to meet the following system requirements:

- OS X 10.7.5 Lion,
  OS X 10.8 Mountain Lion,
  OS X 10.9 Mavericks,
  64-Bit Intel-Processor, min. 2 GB RAM, recommended 4 GB RAM

- Windows 7 Ultimate, Professional, Home Premium,
  Windows 8 and 8.1 Standard and Pro Editions:
  Intel Pentium 4 / AMD Athlon 64 or newer,
  min. 1 GB RAM, recommended 2 GB RAM

- FileMaker Go 13
  iPad, iPad mini, iPhone or iPod Touch with iOS 6 or iOS 7
  For data exchange with PC: iTunes 10.x

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